Saskatchewan Bird Trail

Community Planning Guide

Prepared for

Saskatchewan Wetland Conservation Corporation

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CARDS

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July 31, 1998

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Dear Sharon:

We have great pleasure in submitting this two part report for *The Saskatchewan Bird Trail Strategy* project - *Part 1, the Framework Strategy* and *Part 2, the Community Planning Guide*. The reports respond to the needs identified by the Steering Committee and the Community Workshops.

The project has been both informative and creative, and you and your Steering Committee are to be congratulated for initiating work on such an innovative project, and one with such potential to complement Saskatchewan's current initiatives.

The cooperation received from the SWCC, the Steering Committee and other participants has been particularly helpful. The work with the Anchor Sites, in the form of Community workshops at Chaplin and Quill Lakes was an integral part of enhancing understanding and idea generation, both for developing some of the contents of the reports, as well as providing the participants with an outside catalyst for renewed energy and focus. The attendees were extremely enthusiastic and collectively had many fine ideas, which bodes well for the future success of these areas as bird watching destinations.

The challenge will now be for your own and other provincial agencies, to begin to use the Framework Strategy, and to come together to initiate coordinated action, to successfully implement key phases of the Strategy.

Best wishes

Pam Wight
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SETTING THE STAGE

1. Introduction

1.1 Intent of the Saskatchewan Bird Trail

This Bird Trail Action Plan is an important element of the Framework for a Saskatchewan Bird Trail Strategy. The overall strategy, available as a separate document, examines the concept of developing a Bird Trail for the province, with anchor sites being Chaplin Lake and Quill Lakes. The intent is that other communities with potential bird viewing resources could form part of the trail, in order to tap into the destination attractiveness of the theme, the expertise and resources of numerous players, and the critical mass of such a linked theme.

This Bird Trail Community Action Plan is designed for use by a range of individuals and agency representatives at the local level. It is intended as a planning guide to assist the development of a community bird viewing resource, and to enable community development through this vehicle. It describes a series of steps for assessing whether or not developing a bird trail project might be appropriate for a community , and how to transform an idea for a bird watching area into a concrete project. At the end of the planning process, users of the guide will be well-positioned to actively pursue the creation of a bird watching project. By carefully considering each of the steps, users should be able to avoid many of the pitfalls of an improvised approach to a local initiative, and implement a bird watching project that will have positive economic and ecological benefits.

1.2 How To Use This Action Plan

This document is intended to be used by communities in a wide variety of situations, thus it takes a general approach in describing tasks that need to be considered, within the context of a template that has a step by step process. There is an underlying logic to the way each step is elaborated. However, the order in which the tasks are undertaken can vary, according to specific community and regional circumstances. Similarly, some steps may not be applicable in certain situations, and so can be skipped. What is important is that this document be viewed as a helpful guide, not as a rigid blueprint. The tools in the guide are flexible - they are meant to be added to by the wisdom already existing in the community.

Communities and birding resources are very diverse and dynamic. This plan is sufficiently focused to be useful to all groups, but not so specific as to lack application for most communities. Under each section it identifies a range of activities which constitute good practice, relevant to bird watching and sustainable objectives, and which are oriented to balancing project benefits and costs. Projects could range from the small scale (e.g., erecting birdboxes along a farmer's fencelines or developing a more bird-friendly backyard) through to large, integrated projects e.g., Bird Festivals and regional bird trails with interpretive centres.

Start Where You're At

Starting points vary. Some of the information in this guide will be more relevant to those who are forming a new group; other sections may apply mostly to existing groups.

Lastly, no time-line is provided within the strategy, since the pace is determined by the stakeholders, who may have their own internal time lines or priorities. However, it should be noted that if too extended, the initiative may loose momentum.

1.3 A Coordinator is Advisable

Also important, is an early decision about who will coordinate the planning activities and steps, call meetings and monitor progress. Any stakeholders can do this. Although scale and complexity of the projects will vary, work at the anchor sites and in other communities has shown that it is extremely helpful when a dedicated individual plays this role.

A coordinator may be part time or full-time, a volunteer or paid staff person. They may be housed in government offices, a non-profit organisation, or out of someone's basement. In general, they should be from a group that is trusted, and that has the power to make a difference. The ideal coordinator is one who can commit to spending enough time to really make a difference. Part-time and volunteer coordinators have been able to accomplish a lot for groups.

The coordinator's role varies depending on the needs of the group, but generally it includes maintaining contact with members of the group, performing liaison with interested parties beyond the group; celebrating success; calling, facilitating, and summarising meetings; ensuring participants fulfill their commitments; following up after meetings; and helping to secure funding or other assistance. However, it is important to remember that if the substantive work is delegated to outsiders, the competitive capacities and community ownership of the project is never developed.

2. Before You Get Started

2.1 Is Developing a Bird Watching Project for Your Community?

The question of whether or not birdwatching could or should be encouraged as part of a Bird Trail in and around your community is unique to each community. Opportunities vary greatly between communities, for reasons related to the wildlife resource, land use and ownership patterns, and community interest.

Some questions to consider:

- Does your area have unique or interesting birds and habitats, or large numbers of migrants?
- Are the residents of the area, including the landowners, interested in appropriate visitor use of the land?
- Are there any organizations (government or non-government) which share similar objectives to those of the project (i.e., conservation and community development objectives) who might be natural partners?

2.2 Potential Benefits of Bird Watching to a Community

The potential benefits of a bird watching initiative vary, according to the specific project, its scale and location. Benefits may include conservation, visitor or community benefits (illustrated overleaf).

Questions to ask to try to take a benefits oriented approach for your community might be:

Some Questions about Benefits

- Can we link into a Saskatchewan Bird Trail?
- What will ensure the best participation?
- Which activities are a direct link between project objectives and local benefits? Who won't receive benefits under the activities being planned?
- What kind of long-term investment will local people make in the activities?
- Who will control decision making?
- Are there ways activities can be structured to provide multiple benefits, such as employment for some, training for others, and revenue sharing for the community?

It is important to consider who will get the benefits, how they will be distributed, and how long they will be received.

Potential Benefits of a Project

Community Benefits

- community health: recreation and exercise opportunities
- passive recreation: bird watching, wildlife viewing, aesthetic appreciation, nature interpretation
- active recreation: walking, fishing, cycling, equestrian activities, canoeing
- tourism employment potential: equipment sales & rentals, guided & interpretive tours, concession and restaurant, accommodation, retail sales and other visitor services
- economic development: real value added urban and property tax
- potential development of economic ventures compatible with current land uses
- economic benefits, including some revenues. These may be direct (expenditures at the project location) or indirect (expenditures made throughout the community). Such expenditures would be further encouraged if information provided to visitors indicated where they could see local products, markets, attractions, or services.
- potential for employment and training opportunities
- a market for crafts and locally made goods and services
- improving the quality of life for the host community through involving local people in decisions about tourism in their area, and promoting forms of tourism which can be enjoyed by locals and visitors alike
- potential for increased community integration and pride through the joint efforts and achievements of community-level initiatives

Conservation Benefits

- protecting streams, lakes, and wetlands along with their riparian areas
- conservation of the birds and wildlife which the habitat supports
- maintaining the quality of the local environment, through promoting tourism activities which provide new/alternative economic uses for traditional activities and landscape features
- maintain green space within urban areas, providing meaningful connections between nature and people

Visitor Benefits

- improving public understanding of the value of the bird habitat and the resource
- understanding the activities of the land owner/ manager
- improving the enjoyment of visitors through helping visitors to gain direct contact with rural and community life and thus better understand community activities

Combined Benefits

- increased educational and interpretive opportunities for visitors and locals, adults and children (e.g., school tours)
- raising awareness of environmental issues amongst visitors and local peoples in order to improve understanding of the environment (or habitat) and its value to birds, other wildlife and to communities
- bird watching projects can also be a source of funds for capital or resource management activities

3. Who will be Interested in Visiting Your Bird Trail?

3.1 Who Will Be Your Visitors?

Without an understanding of who will visit your project, why they come, and what they like to do, it is very difficult to influence visitors' behaviour, and hence to manage them successfully for both conservation and community development purposes.

Community discussions at the anchor sites dealt with key markets for many rural Saskatchewan communities, which were primarily:

- pass through traffic (driving through Saskatchewan en route to another final destination)
- those who visit friends and relatives
- hunters in fall

However, there are other markets in addition to these. Check (✔) those markets which are most relevant for your community now, and if you develop a bird trail. It is very important to build upon markets which visit your area right now.

Markets (✔)					
	now	with trail		now	with trail
• pass through traffic			• visiting friends & relatives		
• hunters			• local residents		
• school children			• neighbouring communities		
• regional visitors			• Saskatchewan destined visitors		
• business travellers			• conference visitors or spouses		
• specialist birders			• general interest birders		
• ecotourists			• natural history organisations		
• youth groups			• seniors		
• families with children			• others		

Markets interested in nature, culture, and ecotourism are growing at a much faster rate than tourism as a whole. These markets tend to be extremely interested in:

- natural or wilderness areas
- birds and other wildlife
- education and interpretation about natural history and what they see
- understanding issues, whether related to species, habitat, land management or others
- conservation activities and contributing to them
- more active experiences
- learning about the place and the people

These people are found throughout the population (that means in most of the market segments identified above) and they are growing proportionately. An additional advantage of targeting this group is their sensitivity to environmental matters, both *in* the resource, and *off site* (e.g., in accommodation and other facilities). They also tend to spend more than the average tourist, and willing to abide by codes and guidelines, and to respect people as well as resources.

Communities should also be able to separate out different types of visitor. The more specialist birder and the generalist. Discussions at the anchor sites indicated that the kind of birder expected would be "green birders" for the most part - those who are *generally* interested in birds and natural history, but not very knowledgeable about them, and who need interpretive assistance to enjoy their experience more. Interpretation is one very important aspect contributing to this enjoyment; the interested novice is likely to be a large market and should be provided with clear behavioural and interpretive information and signage, as well as the opportunity for guided tours. The specialist birder often knows what they are looking for, and would be likely to participate on their own. However, they, too, may travel with families and have more general needs.

Children as markets should not be forgotten; school visits may serve a valuable community educational purpose, influence parents to visit the site, educate the future adults about wildlife values, and demonstrate local community benefits. The schools and general visitors may require good trails and particular types of interpretive materials. The Saskatchewan Bird Trail Strategy has more information about bird markets.

3.2 Meet Visitors' Expectations

To have a successful project, visitors must be satisfied with their experiences both in and around the project site. Visitors' expectations must be met, and these may include learning about natural and cultural history, understanding more about conservation and land use, interacting with guides, landowners or local people, or enjoying the quality of community facilities, service experiences, and shopping opportunities.

It is important to be as clear on what people do not want, as what they do want. For example, do they want people to visit the community? To stay overnight? To go to important natural areas?

The kinds of experiences that large markets interested in general birding and nature are looking for include: a range of activities; not *too* physically strenuous; enjoyment of the natural outdoors setting; small scale accommodation; and opportunities to study or learn about nature and culture. Findings relevant to bird watching, about the activities and services which are most likely to appeal to visitors, are shown on the chart.

Remember, too, that markets are dynamic. Keep track of market trends, and if you develop a bird watching site, *track visitor information, expectations and satisfaction on an ongoing basis.*

Activities and Services Most Likely to Appeal

Direction and Orientation: about where to go and how to get there, and easy to see

Walking & Hiking Trails: these hold huge market appeal, and are by far the most popular activity for vacationers interested in nature, and showing significant growth

Bird and Other Wildlife Interpretation: clearly, this is critical. There has been a dramatic growth in interest in these areas in the past several years, and interest in varied viewing opportunities

Enjoyable Interpretation: active and experiential interpretation. Visitors will want more than lists of species and facts. Habitat interpretation is required if birds are seasonal

Varied Activities: there is a trend to more active vacations (but not *too* physically challenging - soft challenges). The opportunities for other activities (than bird watching) in the surrounding area will also be important if the community wishes to keep visitors longer in the area, and it will also meet the needs of markets which are interested in a variety of experiences

Cultural Opportunities: these might include attending an event (whether bird related or not), or participating in a local activity such as a Farmer's Market, or visiting historic and other places which are of intrinsic interest to the local community

Day Use Facilities: moderate development, such as picnic tables, garbage containers, washrooms, and support facilities. Other facilities, such as interpretive centres and viewing towers are less likely to be desired, unless there is a special requirement

4. Elements Required For A Successful Project

4.1 Requirements for Success

There is no one requirement for a successful project. A number of elements must be present, related to: the resource, what is offered, and the visitor experience on or off site. More specifically, these include:

- appropriate access and directions
- opportunities for physical activity by the visitors
- information on birds, natural history and other elements
- relationship information about the land/resource to the community and landowner (crown, farmer, rancher, native group, municipality, etc.)
- motivational interpretation and minimum impact guidelines or rules for minimal ecological impact
- realistic promotion and marketing
- opportunities for financial contributions to go to the resource or to the local community
- linkages with other attractions, services and accommodation at local or regional scales
- image/reality of being an environmentally sensitive initiative

4.2 Anticipating Issues Early

Despite the benefits, there will inevitably be some general issues which emerge in developing a bird watching project. It is important to be aware of these, so as to be realistic in terms of expectations, to assist in avoiding problems, and to develop a successful project.

- to be part of a provincial Bird Trail, bird watching projects have to be done well
- bird watching may not always be compatible with other land uses which may be under consideration in some sites
- potential for conflict with local residents' usual activities if the project is not managed well (e.g., hunting)
- possible lack of appropriate skills or experience for job potential to be realized
- bird watching at manageable scales may have modest levels of economic benefits and may be seasonal
- visitors have to be managed appropriately for the resource, landowner and local residents' interests
- visitors do not suddenly flock to a bird watching area because there is a better opportunity for bird watching. This requires special events or marketing. In any case, successful projects usually build slowly
- word of mouth is the most important source of information in most cases, so meeting expectations is very important
- the visitor experience involves many different aspects both on and off the bird watching site (e.g., have: a range of activities, education/interpretation, a feeling of being in a natural area, a feeling that the project is contributing to conservation values, an opportunity for additional local products and services)

- there are many types of visitors interested in a range of bird watching opportunities, so targeting the types of visitors desired is important for community and landowner satisfaction
- develop at a rate that is comfortable for the communities and the landowners

4.2 Build On Lessons Learned

Lessons learned in other jurisdictions can help you avoid mistakes. In BC, there are numerous stewardship and Greenways initiatives; in Alberta, there have been projects implementing the Community Based Wildlife Viewing Initiative Strategy; and in the US, a watershed planning approach has been taken to protecting lakes, rivers, wetlands, etc. From these have emerged lessons which have applicability to this project.

Top Lessons Learned

1. Clear Visions	• The best plans have clear visions, goals, and action plans
2. Good Leaders	• Good leaders are committed and empower others
3. Coordinators	• Having a coordinator at the regional level is desirable
4. Compatible Needs	• Environmental, economic and social values are compatible
5. Implement Plan	• Plans only succeed if implemented
6. Partnerships	• Partnerships equal power
7. Good Tools	• Good tools are available
8. Measure Progress	• Measure, communicate, and account for progress
9. Involvement	• Education and involvement drive action
10. Small Successes	• Build on small successes

In addition, practitioners offer the following tips:

Top 10 Tips/Hints from Practitioners

1. Include all who have a stake
2. Think large, work local
3. Ask not "do you like it?" But "can you live with it?"
4. Respect the four stages of building partnerships (forming, storming, norming, performing)
5. Just do it
6. Celebrate early successes
7. Clear, measurable goals must be locally-driven
8. Ask for in-kind services
9. When stuck, ask seven times "why?"
10. Focus on the end, not the process

5. Steps for Planning your Community Bird Watching Project

This section describes an approach to planning bird watching projects as part of a Saskatchewan Bird Trail. The systematic approach helps with involvement, and managing development sensibly.

5.1 Develop Your Vision and Goals

5.1.1 Create a Vision

A bird watching project starts with a few individuals with a vision - a practical dream of how a specific local area can work for conservation, visitor enjoyment, and community development. This vision will need to be updated periodically, during the planning process, but it makes a great starting point. Visions can rally individuals to take action and to focus their efforts on specific goals. Clear visions can help groups to understand, relate to, and support conservation and development efforts. When well framed, they can also help the general public, elected officials, business, the press, and community leaders understand.

A leader(s) or project champion(s) are needed. This does not mean that an expert decides what is needed and then leads. It means that ideas, developed and embraced by the community are not personality dependent and do not collapse with the departure of an individual. Different people may be active at different times and use the community-driven goals to motivate, but the mutual overall effort remains paramount.

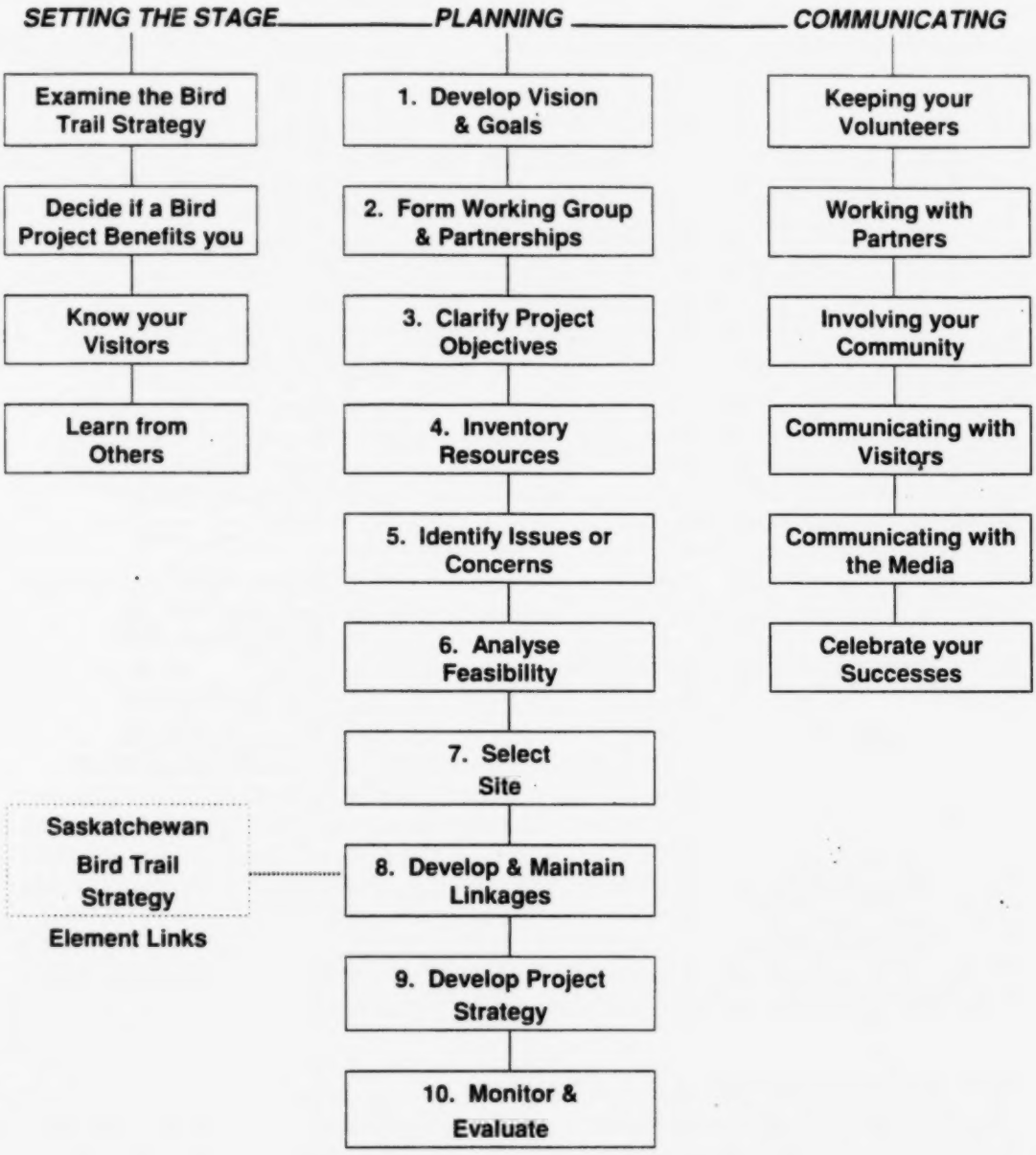
5.1.2 Develop Project Goals

In addition to visions, groups usually develop goals, objectives, and action items. The difference between them is:

> ***Visions***: general statements of where the effort wants to go and what it will accomplish over a given time span (usually 5 to 10 years). Visions should be comprehensive enough to cover a range of project activities
>
> ***Goals***: less general than visions, describing what is needed to obtain the vision, refers to components of overall effort, and are sometimes quantifiable
>
> ***Objectives***: elaborates on goals, describing types of management or activities and are quantifiable where possible
>
> ***Action Items***: explains who is going to do what, where, and when

In the course of developing a vision statement, a thorough discussion of everyone's ideas and suggestions will assist in developing overall project goals. It is also useful to talk to people in the community, finding out what is important to the community, finding out what is planned for the future for potential project areas by land managers, and thinking about possible links between areas and also with the provincial Bird Trail.

Community Site Development Planning Guide: Flow Chart



The goals of members should be reconciled before a common commitment to work can be developed. Consider a sequence of goals that build on one another over time. It is important not to quibble over whether a particular statement becomes a goal or an objective. What is important is to get issues on the table. It is also important to break things down to a manageable scale. This often involves a "nested approach" in which broad goals are set for large areas but small projects are used to implement and achieve those goals.

Start Small

- small successes fuel future, larger ones
- record your achievements (e.g., press clippings)
- start small and demonstrate success before working on a larger scale
- "Celebrate Success" as it occurs

Each partner must agree to the participation of the others. A multiplicity of interests can sometimes act as a barrier to making things happen, or to making them happen efficiently. A collaborative approach seeks to harness joint resources, expertise and enthusiasm towards a common goal. It is important to remember that all partners must get something out of the project. The idea of partnership is not only about sharing benefits, but also sharing opportunities.

This original group will form the core group to guide the project as it evolves. However, as you look around the table, it may seem that there are a number of interests not represented.

5.2 Form a Working Group and Partnerships

The initial spontaneously formed group can rally support for subsequent stages, and sustain enthusiasm over a longer term, by finding a more permanent structure - a formalised and broadly based group including the original core group. This group should have the intent to carry the project forward, keep up awareness of public and partners, and providing ongoing coordination.

Which comes first, the project or the group? Either can come first, it doesn't really matter. The number of members of the group will vary with the purpose of the group. This core group will likely need to decide if they can complete a project on their own, based on the overall project. Membership should be open to anyone with a genuine interest in the goals of the group, and who will be affected by it. The diversity of the community should be represented.

5.2.1 Invite Selected Interests to the Table

Representatives of the municipality should be involved at an early stage, as well as any prominent groups in the communities whose objectives seemed to overlap with those of the initially conceived project. The objective of gathering such representatives together would be to discuss the initial concept more fully, obtain commitments to work toward the initiative, and to determine if all would be core committee members.

Check (✔) what interests are needed for your project and suggest the name or an individual or two.

Typical Community Interests That Might Be Represented	(✔)	Suggest a Name
• land owner		
• local governments		
• tourism organisation		
• recreation group		
• conservation group		
• private sector tourism operator		
• fish and game association		
• elected officials		
• students		
• church groups		
• local businesses and industry		
• provincial agency		
• service clubs		
• chamber of commerce		
• crown corporations		
• birder/naturalist		
• first nations		
• education		
• farm organisations		
• seniors		
• financial groups		
• opinion leaders		

5.2.2 Identify and Develop Partners

Bird watching site development projects should be integrating projects. The initiative should be about the ability to integrate the energy and resources of many parties. The project will provide benefits for many users, and also impact on the decisions taken by many organisations. Because of this, they need to be broadly based and cooperative. Defining the needs you have of a partner may help identify and scout non-traditional and other potential partners. The important thing is to pull together a partnership that is of manageable size, creates synergy, and represents the key interests in the project.

Projects are most powerful if they are supported by many, not just one, community group, e.g., conservation organisations, service clubs, professional or industry associations, recreation groups, and key community leaders, etc. Smaller costs may often result when clubs and organisations are involved in developing projects or facilities. The project can focus the resources of these various groups to common objectives.

It is important to involve all key representatives early in the process, so as to obtain their "buy in" and

to benefit from the skills and contributions as early as possible. Remember that partners also need to benefit from the project. Partners should have the ability to be represented on the project committee if they wish.

Partnerships can be as varied as the types of projects. Partners should have a: complementary perspective, commitment to the project, and offer some contribution (support, dollars, services or products in kind, advertising, technical assistance, volunteer time, etc.). The main thing is to have the right kinds of partners - those who will champion project objectives.

5.2.3 Finding Funding and Assistance

One of the top of mind issues will be having adequate resources to accomplish and maintain the project. At the outset, project capital, equipment, marketing and operation/maintenance costs should be identified, as well as potential sweat equity, partnership contributions, and other sources of funding. You should line up funds and in-kind services early in the project, or two undesirable things may happen:

- your stakeholders will buy into a process and scope of work only to find out they can't afford it
- you will spend more time looking for funds than participating in the process

Determine your Funding Needs

These are funds needed to allow you to fulfill your goals through projects and activities. Work out roughly how much you need in a preliminary budget, and modify this as the specific project takes shape. The budget should distinguish between project costs and ongoing administrative costs which support the group's activities.

Kinds of Things you Might Need Money for:

- correspondence and information distribution to the public
- advertising (events & activities)
- logistics for events (rentals, refreshments, etc.)
- administration costs (photocopying, supplies)
- hiring expertise
- access to information (e-mail, reports)
- supplies for projects (building materials, tools, equipment)

Funding Sources

Adequate funds are required to initiate and maintain the project, and are critical to project viability. There are agencies or organizations which may offer grants or low-cost loans. Some suggestions for funding or program assistance are presented in the Appendix. However, these sources tend to be dynamic. The important thing is to *start*. Ways to obtain capital dollars other than outright grants or loans are outlined below. Fund raising is not always necessary. Human resource contributions will likely be important for any project, and non-governmental organisations are often untapped resources.

Funding Sources

- ***Members*** (through dues, newsletters, appeals or donations
- ***Other individuals*** (personal appeals via mail, special events, sales, canvassing, bequests, etc.)
- ***Fundraising events*** (benefit dinners, silent & live auctions, raffles, etc.)
- ***Corporations and local businesses*** (in-kind contributions such as machine time, wood & metal products, gravel, trees, skilled labour, matching employee contributions, partnerships)
- ***Foundations*** in Canada, the US and internationally
- ***Government agencies*** (federal, provincial & local) or special programs (through project proposals)

If you are working with a variety of partners, it might help to keep a chart identifying the category of supporters.

	Category of Support (Hypothetical)					
Contributor	**Financial**	**In-Kind**	**Viewing Structures & Facilities**	**Interpretive Material**	**Directional Signs**	**PR**
Agencies	•	•	•	•	•	•
Foundations	•					o
Corporations	•	o	•	o		o
Site Owners	o	o	•	•	o	
Chambers of Commerce	o					o
Departments of Transportation		o			•	o
Tourism Organisations	o	o		o	•	•
Town/County Councils		o			•	
Local Press						•
Officials						•
Conservation Organisations	o	•		o		•

(• = major supporter, while o = minor supporter)

Technical assistance may be available for free, particularly as related to wildlife conservation, ecological science, marketing, or natural resources. Organizations that may offer technical expertise include national level non-profit groups, governments, foundations, universities, and possibly others. Such organizations are often interested in collaborative work or projects, particularly when there is a benefit to the resource.

The kinds of activities which such organisations assist, may include:

- scientific research
- management questions related to conservation
- marketing
- fund-raising
- interpretation and education
- designating special conservation areas

Fund raising pointers are provided:

Ten Steps to Successful Fund Raising

1. Develop a sound budget, funding request, or proposal. Your potential donors will want to know exactly how you plan to spend their money
2. Start your fund raising early on in your project. Donors like to help create a project
3. Have a fund raising strategy. If you need $10,000, will you get it in two $5,000 chunks or ten $1,000 pieces?
4. Use your committee to identify those people or groups who stand to benefit from your project. Consider local businesses, tourism interests, conservation organisations, schools, and agencies
5. Have people do your fund raising who are comforatble asking for money or contributions
6. Ask for a specific amount. Know how much your prospective donor can give and is likely to give before you have a meeting
7. Approach your likeliest donors first. Your first contribution is typically the hardest to get. But once the ice is broken, people like to give to projects that other people are excited about
8. Be enthusiastic. If you don't believe in your project, no one else will
9. Follow up each personal contact with a letter. Your letter should restate the funding commitment that was made, or it should answer any questions the prospective donor has
10. Develop publicity for your project early on. If potential donors have read about your project or see or hear about it, they will be much more inclined to give

Research Funding Sources and Choose One, or a Group

Make sure you have enough information to compare the various funding alternatives. Consider what types of fundraising are appropriate for your group, then research the sources, such as those listed in the appendix. Make sure your information is up to date. Support at the community level often looks good to the funding agency, as can backing from elected officials, lending credibility to decision makers. Furthermore, there are fewer outright grants made; it will be likely that local contributions are a requirement.

When Comparing Funding Sources, Consider:

- application schedules and timing of proposal preparation
- eligibility criteria
- probable competition for funds
- success in the past with the source
- how closely fund objectives match project needs and priorities

Enabling Visitors to Contribute

Wherever possible, visitors should be given the opportunity to contribute to the costs of the resources/programs provided for their use and enjoyment. In most projects it is unlikely that visitor fees can be charged. It is also rare that businesses who benefit from visitors (retail outlets, food and beverage operations, accommodations, gas stations, etc.) contribute directly towards the potential social and environmental costs of the visitor activities.

However, conservation projects are actually a good opportunity to involve the visitors. This could be approached by:

- simply providing literature about the project along with a donations box in a prominent place (Appropriate opportunities and locations for donations need to be well thought out on a community basis: for example, honesty boxes at car parks, or at trail heads, or where information leaflets are available)
- asking for a voluntary contribution (to the project or conservation fund) as people pay for goods and services
- adding a contribution, with an option for the visitor to request that it be deducted (e.g., add a donation to the bill and indicate that payment is voluntary, but the funds raised (or better still, matched) will be used for the local project)
- levy a compulsory contribution

The third is probably the most effective, appropriate and easy to operate. Sometimes an unexpected benefit of this type of activity is local or wider interest by the press, who cover the participating businesses, who also benefit from the publicity.

5.3 Clarify Project Objectives

It is important that everyone's objectives be clear, and developed early in the project. These should include:

* what the bird watching site is to be managed for
* what to avoid
* what the priorities are

Objectives set the principles for management and development, and give targets for monitoring success. The actual activity of trying to ensure objectives meet everyone's needs will help tremendously in actual project implementation. In addition, being clear on what people do *not* want may be equally important.

Objectives which might be relevant to a number of communities could include:

- maintaining hunting and fishing opportunities
- protecting wildlife populations and preserving habitat
- developing income-producing uses of the land
- maintaining agricultural activities on adjacent lands, unimpeded
- encouraging the use of the lands for educational and interpretive purposes, in acknowledgment of the significant role or value of the resource
- enhancing recreational opportunities for local residents
- promoting activities which may lead to employment opportunities for residents

The time taken to reach agreement on the objectives may vary with the scale of the project, the number of people or agencies involved, and the number of issues to be addressed.

5.4 Develop an Inventory of Resources, Management, and Uses

Several inventory and analysis steps are needed, to understand the key features of the area, its resources, current uses and problems. Little new field work is likely to be necessary. Knowledgeable local people are usually sufficient, plus government or agency information and reports. Obtaining maps of the area is also helpful. All the information should be summarized, and where appropriate, mapped. Reports often already have the material in a useful form. Maps should show ownership, access points, and any known plans (e.g., for development on, or adjacent to the resources). These maps form a base for planning the project, informing the public, and delineating the geographic boundaries of the project.

The features of interest to the visitor and relevant to bird watching, viewing other wildlife, natural areas, and to tourism attractiveness should be identified. Recording these will be a good first base for subsequent interpretive or publicity activities. The description will vary considerably, depending on the resources, where visitors should be encouraged to go, and the objectives of the project. Some of the information may be useful to evaluate project opportunities or constraints at a later step; some of the information may be useful as part of the visitor interpretation program.

5.4.1 Describe Natural Resources and Ecological Systems

This step provides an overview of the features relevant to bird watching and more general natural history interpretation. How much attention each item needs will depend on the resources of your area and the kind of project you have in mind.

How to Begin an Inventory of Resources, and Features of Interest

Viewing Features or Attractions	*Attraction Exists (✓)*	*Opportunity (✓)*	*Notes or Details*
A. Wildlife & Natural Attractions			
Bird Resources • shorebirds • upland birds • migratory birds • rare birds • known bird watching sites			
Birdlife Details • populations • characteristics • habitat used • problems with species & causes • ecological role • trends			
Other Fish or Wildlife • rare species • charismatic mega-ungulates • species valued for their beauty			
Topography & Landscape Features • lakes • islands • rivers • reservoirs • springs • sand dunes • watersheds/headwaters • uplands • beaches • bedrock outcrops • fossil beds • geological features			
Habitat & ecosystem types (types of landscape, main vegetation) • forest or woodland • wetlands • parkland • grasslands • botanical gardens • habitat restoration areas			
Climate • temperature range & averages • snowfall/rainfall • freezeup & breakup			

Viewing Features or Attractions	*Attraction Exists (✓)*	*Opportunity (✓)*	*Notes or Details*
B. Cultural Features			
• old cabin or fort sites • old building ruins • site of a historic event • archaeological sites • living culture • ceremonial dances • burial grounds • churches • exhibits • farms of interest • historic railroads • aboriginal culture • memorials • missions • native folklore • pioneer homes • Others			
Events • costumed events • ethnic celebrations • agricultural or other fairs • animal or other shows • artisan studio tours • barbeques • barn dances • bicycle tours/races • country & fold music festivals • craft shows • farm tours • flower shows or festivals • food festivals • harvest celebrations • hay rides • special day celebrations • parades • ploughing (horse or tractor) contests • religious celebrations or observances • rodeos • specialty food tasting events • threshing bees • tournaments & sports • tractor pulls • wildlife calling contests • wildlife festivals			

Viewing Features or Attractions	*Attraction Exists (✓)*	*Opportunity (✓)*	*Notes or Details*
C. Special or Scenic Features & Facilities			
Scenic features • scenic views • beaver ponds • whitewater • waterfalls • visible human use/disturbance elements • sense of wilderness			
Special ecological elements • Protected area nearby • National, provincial or regional Parks • Natural Areas • bird or wildlife sanctuaries • seasonal events (e.g., wildflower blooms, bird migrations) • existing or potential demonstration areas • wildlife management areas/programs			
Facilities • hiking or nature trails • picnic areas • interpretive, information or visitor facilities • bridges • gift shop • demonstration facilities • viewing/observation towers • information centres • libraries including special collections • universities or colleges			
Orientation Areas • nearby attractions, sites, or resources interpreting the same or related topics • key locations for visitor orientation such as major road intersections, campgrounds, boat launch areas, and other prime visitor contact areas			

5.4.2 Describe Current Resource Uses and Activities

After being identified, resources and uses should be described and understood. If the habitat is managed by farmers, natives, or others, it will be particularly important to know and understand the resource use.

The value of the resources to the current user, as well as their scientific value should be highlighted. This will be of interest to the visitor, whether local or tourist, and will help present the resource values to them. Much of the information gathered to examine resource use activities can be gathered at the same time as the resource inventory information in the previous section.

Questions which may be helpful for describing use or for interpretation purposes are:

- what agency or agencies administer the proposed site?
- what kinds of protection or designation have been or could be given to the site
- what, if any, transportation, industrial, commercial or recreational developments are planned for the site?
- what restrictions apply to the site, e.g., land use bylaws or municipal plans?
- is there public access to the site?
- what natural processes can be seen at this site (flooding, fire, disease cycles, plant succession)?
- what areas are critical to birds using this site (e.g., nesting habitat, migration staging areas)?
- what areas are critical to other wildlife using this site?
- what plants or animals are using this site (species, seasonal changes, rare endangered)?

Description of Current Resource Uses and Activities

Resource Use and Activities	Details
Overview of resources, land use patterns & types of use in the area	
Industry (mining, minerals, logging, sand or gravel)	
Trapping (local trappers are the best source of information)	
Hunting (general & specific information on the major species, populations, seasons, who hunts, & so on)	
Fishing (by locals & visitors, in the area & outside it, & any impact information, both general & specific)	
Guiding (does anyone have a license to guide for hunting or tourism?)	
Tourism & Recreational (commercial, free independent travelers [FITs], special recreation opportunities, boating, hiking & camping, & winter or summer use)	
Access (name specific operators, as well as FITs)	
Cultural Resources (educational, cultural, or research purposes)	

5.5 Identify Issues or Concerns

Issues are "problems that need to be addressed" in this context. This step is intended to assist in a realistic assessment of the potential for successful wildlife viewing, with a view to avoiding possible problems. Project managers/coordinators must understand how visitors impact on the site, what causes wear and tear, what resources are fragile, and which areas must be protected. They should

also be aware of the issues that concern the local community and the land owner/manager of the bird watching habitat.

Framework for Issues Analysis

What? What or who is being affected and to what degree? What information is available about the issue? Do different sources of information conflict? What is the legal basis? What is the significance to your project?

Who? Who is involved in the issue? Who has responsibilities? Do they all think there is a problem? Do their values conflict? What is their interest in the issue? How do each of the parties relate to one another? What is your ability to tackle these?

Where? Where does the issue occur? How widespread are the effects?

When? When does or when did the issue occur? Is it a slow, steady occurrence, or an immediate, very dramatic occurrence?

Why? Why is the issue happening? Is there an easily identifiable cause?

So What? Examine how your knowledge of these might be used in a positive fashion to educate the visitor and local bird watcher about ecological interconnections

5.6 Analyze Bird Watching Potential and Feasibility

After completion of the previous steps, all the information should be available for considering the feasibility of your bird watching project. A project can be developed in different ways. For example, it could be developed in conjunction with commercial tourism operators or guides; or with non-commercial individuals or agencies wishing to attract visitors who are on day visits or just passing through; or oriented more to resources conservation. It could be stand alone, or very much integrated with a regional or larger system.

Questions which might help refine the original project concept to examine its feasibility include:

- what are the main options for the bird watching project?
- what are the disadvantage and advantages of each option? is the economic feasibility of the project critical, and to what degree?
- are the activities likely to appeal to visitors?
- what is the intrinsic appeal of the area to markets, and which markets?
- are permits required for any of the project elements? are there further attractions, opportunities or activities which would help fill out the visitor's experience?
- what facilities are needed and where?
- what would be the visitation season(s)? how would visitors get there?
- what would be the maximum number of visitors expected at any one time? what special protection might be needed for sensitive wildlife or natural area, or to ensure appropriate contact (or lack of) with landowners' or local peoples' activities?

It is important, also, that the expectations of both the community and the visitor are met, for project benefits to be realised. Aspects to consider might be: where will the visitors stay if they decide to overnight in the area? Where will they eat? How will local people be compensated for services? Are there any visitor transportation needs to consider? Are there any opportunities for visitors to buy locally produced crafts and goods? How will visitor revenues be most equitably distributed?

Economic feasibility depends on costs, revenues, and other benefits which the community might receive (e.g., jobs, technical assistance, resource conservation, or enhancement of community recreation opportunities and quality of life). Whether or not the balance of these costs vs. the benefits is favourable enough for you to develop a bird watching project, depends on your objectives. It may be that avoiding a financial cost is a requirement, or you may value other benefits enough that you want to develop your project even though the direct, or early economic benefits may be small.

5.7 Select Bird Watching Site and Trails

When the previous steps have been accomplished, project site selection may be finalised. Those aspects to consider are shown:

Bird Trail Site Selection Criteria

1. ***Reasonable Opportunity for Viewing Birds.*** High probability of seeing birds, at least during a specified season(s)
2. ***Bird Characteristics.*** The main viewing attraction(s) could be large concentrations of birds, or those species valued for their rarity or beauty
3. ***Ability to Withstand Public Use.*** All fragile ecosystems or habitats with sensitive species should not be included unless public use can be restricted or managed so as not to harm the site's natural values
4. ***Reasonable Access.*** All sites should be reasonably accessible to the public by car, foot or boat. Access to the site should conform to highway safety standards.
5. ***Scenic Quality.*** The scenic and wildlife values of the site should not be degraded by adjacent or visible conflicting land uses (e.g., garbage dumps, sewage treatment ponds, degraded industrial or agricultural land, or automobile junkheaps)
6. ***Legal Access.*** If the site is in public ownership, it should be open to public use. If privately owned, the landowner should be willing to guarantee, in writing, public access to the site. As an alternative, wildlife viewing from an adjacent public road can be recommended if it is explained that access is not authorised.
7. ***Ecological Significance.*** Emphasis should be given to high-quality or significant habitats, especially those that contribute to bird and other wildlife diversity on a regional level.
8. ***Minimal Conflicts.*** There should be few or no incompatible activities, or conflicts with other users.
9. ***Interpretation.*** There should be special efforts to promote or interpret the bird and wildlife values, and to link with local attractions and the regional/provincial Bird Trail

5.8 Maintain and Develop Linkages

Since the intent of your project is to tie local bird watching opportunities into a Bird Trail for Saskatchewan, it is appropriate to look at linkages at various levels: provincial, regional and local. When developing plans for your local area, and after the inventory has been completed, and site(s)

selected, it should be possible to see:

- opportunities for theming which complements, rather than duplicates regional or provincial Bird Trail Sites
- access routes (or lack of them) to get visitors to various interpretive resources or sites
- any potential linking of sites (for large parks, lakes, etc.) for developing local and regional self-guided auto tours
- any duplication of interpretive sites
- potential for distributing visitor flow and use of under-used areas
- potential conflict with other sites (recreation areas, archaeological areas, sites of features that need some kind of special management or protection)
- general visitor flow to and through the area, shorelines, park, woods, or other site
- potential bottleneck areas or other flow problems
- short or longer trails or loops
- easier or more physically challenging trails or loops

5.9 Develop the Project Strategy

Bird watching sites may be in varied environments, from very remote, to urban locations. The selected site for the project should be classified for management purposes. The appendix shows a site classification system ranging from natural to education/interpretation. The following chart helps local groups classify their site needs. Refer to the appendix, then check (✔) appropriate boxes to indicate the management needs for the site.

Management Needs for the Site

Resource Management Goals	Now (✔)	Proposed (✔)
Natural		
Semi-Natural		
Intensively Managed		
Restoration		
Education/Interpretation		

Using the resource management goals, check (✔) the appropriate boxes in the chart below to indicate the level of development now and proposed.

Level of Development Proposed for the Site/Area

Level of Facility Development	Now (✔)	Proposed (✔)
Primitive		
Semi-primitive, non-motorized		
Semi-primitive, motorized		
Rural, motorized		
Rural		
Urban		

When the level of development has been decided, it is easier to decide on the facilities which are appropriate on the site. The following chart presents a list of possible facilities in the bird watching area. Check (✔) appropriate boxes to indicate the level of facilities appropriate for the site.

Indicate the Extent of Site Facilities, Viewing Structures & Interpretive Information

Site facilities	Now (✔)	None (✔)	Proposed (✔)
Trash cans			
Restrooms			
Directional Signs			
Trails, boardwalks			
Viewing blinds			
Viewing platforms			
Viewing towers			
Interpretive signing			
Interpretive kiosk			
Brochures			
Visitor centre			
Guided tour			
Self-guided tour			

Management may embrace a whole range of measures aimed at managing both tourism and the environment in which it takes place. Such initiatives may be aimed at the visitors themselves, the resource or the host community - and sometimes all these.

5.9.1 Resource Management Strategy

This element should determine how the wildlife viewing project will be run, physically, on the land, and what activities and uses will be allowed. Maps and guidelines should be drawn up to show the whole area, including the areas adjacent to the project.

There should be agreement about the basic aspects of the project. For example, low maintenance programs or facilities may be preferable, so low maintenance design should be built in from the outset. Answering a number of questions can provide resource management guidelines.

Policies may also help with resource management. For example, involving the local planning authorities and conservation agencies, who may be able to assist in measures for protection, or who have the resource-based expertise to assist in good initial project conception and design.

Elements to Consider in the Resource Management Strategy

Visitor Activities
• Bird watching and other visitor activities (e.g., wildlife viewing, walking/hiking)
• Other compatible activities (e.g., agriculture, other recreation, or forestry)
• Focused use (via trails & viewpoint development) or random use of the area?
• Independent visits allowed, or guided, or both, & what programs, if guided?
• Visitor behavioural guidelines or not?
• Use of motorised vehicles by visitors (or maintenance personnel)?
• Seasonal variations or schedules?
Design & Project Parameters
• Built structures or not (these may be as simple as viewing blinds)?
• If appropriate, facilities design, construction & maintenance
• Waste management (solid & sewage)?
• Low maintenance project design
• Access points by visitors
• Access for management of trails or other project features
• Donation boxes or other forms of revenue generation on site?
• Aesthetic design for minimal visual impact (of trails, structures, or signage etc.)
• Implementation schedule
• Public notices to inform visitors about policies, activities, etc.
• Safety programs where relevant (including guidelines, warnings, treatment plans & personnel training)
Resource Protection, Management & Monitoring
• Habitat & wildlife management (e.g., cooperation with agencies or organisations for research?)
• Specific resource protection or conservation plans, if required
• Transportation management decisions (e.g., potential access and transportation, location of trails, access points, parking, pedestrian signage, public or guided transport to the site)
• Conservation measures (e.g., restrictions on use of certain locations, channeling visitors, minimise conflict, road or trail closures, or other protection activities)
• Monitoring & research (impacts, if any, on wildlife populations, habitat, community & visitors)

5.9.2 Visitor Management Strategy

Visitors will vary, all making different demands and impacts on the resources and the local community. They may also vary depending on the kind of advertising message the place sends out. Visitor management is an important aspect of any form of tourism in sensitive areas, whether in

communities or in the bird watching areas. Tools which have proved helpful to consider are shown.

Visitor Impact Management Tools	
Target appropriate markets:	Influence the mix of visitors by marketing to attract specific types of visitor (e.g., Day vs. Staying visitors; public transportation users vs. Car drivers; independent visitors vs. Groups)
Promotional tools:	Agree about when and where to promote a site, or discuss alternatives for visitors at sensitive times
Educate & Inform:	Use Tourism Information Centres and other centres, and materials, to educate visitors before they arrive on site, about expectations, appropriate behaviour, where to park, or codes to follow
Interpret & Motivate:	Use information and interpretation to give visitors a greater understanding and appreciation of the sensitivities of the environment or the community, as well as their functions
Direct visitors:	Use signage far more as a means to influence visitor behaviour, as well as directing; for example, keeping them to appropriate trails
Influence behaviour:	Develop a code of conduct, environmental charter, or guidelines, directed at visitors, local community, operators, or all parties
Guides/stewards:	Consider on-site personnel to supervise, protect, inform & interpret in a positive way
Involve community:	Involve schools, conservation or youth groups, particularly when it comes to maintenance and improvements, to reduce conflict
Involve community agencies:	Involve agencies and individuals in developing a code of conduct or guidelines for the project site and local community

5.9.3 Interpretation and Information Management Strategy

Information: The provision of effective information is critical for visitors' enjoyment and appreciation of the bird watching site, and as a tool to assist visitor management. If they have been well informed, visitors will go away having made the most of their visit, but feeling that there is more to see, so encouraging them to return and give recommendations to others.

Information to visitors who stay overnight in the community should be wide-ranging. Elsewhere in this document the importance of supplying details of local opportunities has been stressed (walks, shops, markets, events, etc.). It would also be helpful to make information available on the project, its purpose, conservation issues, the sensitive nature of certain locations, the area as a whole, and possibly a code of conduct or guidelines for visitors.

Information aimed at visitors before they arrive on site, or in the community, can have a beneficial effect in visitor management and behaviour. It can be used to encourage visitors to:

- come out of season, or to come at certain time
- to visit a particular location
- to target particular types of visitor
- to ensure the project is well described, so that the visitor's expectations are met, and that positive word of mouth results

- to channel visitors in particular directions or even to channel visitor activities

Guidelines for Visitors: Visitors' codes or guidelines are particularly helpful. They can give rules or principles for each use. Where relevant, these might include:

- site boundaries to clarify where visitors may/may not go
- suggested party size
- rules for use of motorized equipment.
- rules about whether or not dogs are allowed and if they require to be leashed
- access information
- advice on visitor behaviour to avoid bird or wildlife harassment
- guidelines for appropriate visitor conduct on site (and in the community)

Education and Interpretation: The approach to interpretation and education needs to be planned. This should include the materials and signage which are considered appropriate and necessary. The materials could include; guidebooks, brochures, signs, maps, photos, library information, and so on. Assistance in preparing these materials, as well as with design, may be available from some of the project partners, research groups or agencies.

Information provision may be seen as a joint activity among many players. Information can be provided about the project site, the wider area, and the relationships which exist between it and the community and local facilities. In this way, mutual support and awareness is built up between the parties.

Information Outlets: These should be broad and varied. Here are some ways of putting information across:

- ***at the point of arrival***. When visitors are greeted, they should be informed what information is available, and how to use it
- ***information packages in visitor hotels, motels and campgrounds***. Materials could be in a dossier, or bound
- ***brochure racks***. These brochures can be taken away for reference. The most important leaflets should be maintained here
- ***collections of books and maps***. These may be available at the local library or at certain commercial establishments
- ***interior display boards***. These are most relevant in larger facilities, and might include a local map marked up with walks, specific locations, etc.
- ***informed staff***. Staff at many local services, facilities and attractions should be informed about the project, and prepared to offer guidance or to answer questions
- ***at the site or at a point in the community***. Printed material or even a resource kit may be made available, but visitors are invited to use the brochures or materials and replace them

Interpretation Objectives: Three major kinds of objectives in developing interpretive plans include: learning, behavioural and emotional. These can help with visitor management as well as fulfilling enjoyment and satisfaction needs, so all should be built into the interpretation. Examples are shown in the following exhibit.

Interpretation Objectives

1. ***Learning Objectives*** (*what* you want the visitors to learn or remember)

- these are the most commonly used, and focus on visitors being able to describe, name, etc. after leaving the site
- e.g.: the majority of visitors will be able to list three survival strategies illustrated by the birds on display in the exhibit

2. ***Behavioural Objectives*** (what you want the visitors *to do*)

- these are the most important objectives, which help focus on what it is you want the visitors to do, and how you want them to use the information you are giving them
- e.g.: the majority of visitors will want to try at least one new (learned) technique to attract birds to their backyard by the end of the year

3. ***Emotional Objectives*** (these first need to be accomplished to *alter behaviour or attitudes*)

- these help visitors remember the topic because of a strong "feeling" they create, helping the visitor to feel surprise, anger, sadness, guilt, acceptance, pride, and other desired emotions related to the subject
- e.g.: the majority of visitors will feel that litter is a disgusting habit that produces an undesirable place for them, their children and wildlife

5.9.4 Operational Strategy

Plans for how the wildlife project will operate should be detailed. This may incorporate elements already identified. However, where relevant, it should also consider:

- project scheduling
- development and construction, if required (e.g., trail clearing, building bird watching blinds)
- range of activities on and off site
- interpretation and materials for these
- organisational, volunteer, or staff roles and responsibilities
- management of any facilities
- transportation and access, and disabled access
- waste and sewage management
- safety considerations

5.9.5 Marketing Strategy

Marketing includes all the types of ways that visitors (local or more distant) are made aware of and attracted to the project. Marketing and information are closely related.

Effective Communication Involves

- understanding one's audience
- being careful with terms
- knowing how the target audience likes to receive its information

Communicate through meetings, brochures, internet sites, annual reports, news releases, and other ways.

Contents: Marketing should use the information from earlier research, and the suggestions in this guide, to target appropriate visitors, and select where to place literature, publicity or advertising. Provincial conservation groups, for example, may provide a useful source of visitors for the project. Several groups operate trip programs for their members, offering a variety of trips. It might be useful publicity to organize such a guided visit jointly.

You should try to convey what is special about the project and the area, the landscape and heritage features in which the wildlife resource is located. Also, an appreciation of the sensitive nature of the area should be conveyed. This is an opportunity to convey to people how to enjoy their visit in a non-damaging way, and how to treat landowners and other users with respect.

Examples of marketing mechanisms which might be appropriate include:

Examples Of Marketing Mechanisms

Publicity: newspaper articles, in local, regional or provincial papers; press releases; providing a "ready made" article.; media FAM trip; providing information to guide books of the area; community journal(s) at/near the site (where visitors record their experiences, birds seen, etc.) This generates interest, and may form a good basis for publicity.

Word of Mouth: This is the most effective means to obtain visitors, whether from friends, relatives, or colleagues. The experience must be advertised accurately to meet visitors' expectations and encourage repeat visits.

Advertising and Promotion: Paid advertisements (expensive), but joint promotions with agencies, operators, municipalities, accommodations, etc. may be cost effective.

Internet: An exploding form of informing and advertising, it is also very cost effective. Link with the numerous bird sites, especially those allowing free information and links. Link with other sites, (e.g., tourism, partners, conservation groups, regional attractions, provincial agencies).

Events and Exhibitions: Stand-alone, focused on the bird watching project, or joint (e.g., community activity, organisation, Saskatchewan Bird Trail Site). Children's events are popular, and local wildlife organisations, youth groups, etc. could be invaluable.

Joint Marketing Initiatives: Joint marketing is closely associated with developing linkages (thematic or geographic). The linkages could be with agencies and organisations with complementary or similar objectives; or "on the ground". For example, projects do not have to be "completely new"; they could tie into pre-existing projects (e.g., a trail system), events (e.g., a bird festival), attractions (e.g., nearby provincial or national parks or an interpretive centre). The addition of marketing partners should be mutually beneficial. Possible partners include all of the Saskatchewan Bird Trail Sites and members, regional groups, small operators, local enterprises, conservation groups, accommodation and activities operators, transportation operators, and tourism associations.

Publications for birders are also obvious to target, e.g., the Birder's Guide to Bed and Breakfast: United States and Canada (Santa Fe: John Muir Publications, 1994). This lists 250 Bed and Breakfasts throughout North America's finest bird-watching regions. The hosts are keen birders with first-hand knowledge of local species. They keep logs and sighting by guests. Small, intimate accommodation is the kind of alternative that ecotourists are increasingly seeking, thus B&Bs are natural. In Alberta, one birding-focused B&B has experienced considerable success with this theme, and has extended into offering commercial tours, and the B&B is cleverly named with a bird theme.

5.10 Monitor the Project

Monitoring your project is very useful for success, particularly regarding visitor attitudes and satisfaction. It might be that the project could be usefully modified to increase visitor satisfaction. Again, research and monitoring may often be carried out in conjunction with partners.

The relationship between the visitor, the bird watching site and the community may be very dynamic. Visitors and other elements may be constantly changing; the community may grow larger or smaller or in its structure; some issues may emerge only after the project has been in operation for some time. The scale of monitoring often depending on project scale and complexity. For example: the status of wildlife populations and territory; the impact of visitors on neighbouring land managers; or on the residents of the community. Select indicators and associate them with achieving the goals. (e.g. no of canoes rented, no of group tours, no of miles protected, no of visitors, no of brochures taken, building accomplishments).

Evaluative questions which might help in monitoring are:

Questions which Help Evaluate Project Work

- did you achieve your goal? If yes, how? If no, identify why and learn
- can you build on the strengths?
- did you choose the most appropriate action?
- did you adjust your plan as you proceeded?
- what have you learned for the next goal?
- did your group work well together?
- were any key interests forgotten?
- do you need support, e.g. group facilitation, filing, administration?
- are volunteers maintaining energy levels and commitment, or burning out?

It can be relatively easy to make research and monitoring part of an ongoing community participatory process. The objectives developed for the project initially, as well as project parameters and identified issues, can allow the measurement of social, economic, and conservation objectives. In addition, continuing community participation will greatly add to the sense of ownership which the community has in the project, and thus to ongoing success.

6. Communicating and Working with Others

Whoever are the partners, players, volunteers or visitors, some basics for success in communications of many kinds are helpful.

Tips for Success in Communications

1. ***Clarity***: ensure your message is straightforward, logical, simple, and not open to misunderstanding
2. ***Completeness***: answer more questions than you raise
3. ***Conciseness***: don't ramble - stick to the point and make it quickly
4. ***Concreteness***: be as specific as possible and avoid being abstract
5. ***Correctness***: check your sources, be precise, base your statements on facts, don't be careless

Communications should be ready to explain how the particular audience (members, partners, community, media, visitors, etc.) can help (remedy the problems) or contribute, i.e., what actions they can take. Some communication tools to consider are:

Communications Tools

- highway signs
- billboards
- field trips
- newspaper inserts
- PSAs
- storm drain stencilling
- community events
- bumper stickers
- awards
- newsletters
- internet
- license plates
- peer to peer communication
- phone trees

6.1 Working with and Keeping Your Volunteers

In many cases there will be no distinction between the members of your group and volunteers. For local initiatives aimed at conservation and community development through a bird watching project, all involved will be volunteering their time and sharing responsibilities. In other cases, a few individuals will emerge as the "core" volunteers of the group.

There is often a cycle of volunteers moving in and out of leadership roles as other commitments and energy changes. Rotating responsibilities can help keep everyone involved and avoid "burn-out".

Rewards to Volunteers and to Groups

Understanding what motivates volunteers is also important, particularly when groups benefit from the volunteers. Volunteers have various motivations for getting involved. Think of the reward that would most encourage an individual or agency representative to get involved - what's in it for them? Before trying to recruit, however, get organised. It will be a more positive experience for all concerned. Look for volunteers with leadership ability and who like people. They will draw others to your cause.

Showing appreciation for volunteers is an important aspect, particularly when they relate to the motivation of the volunteers. For example, crediting their achievements publicly.

Rewards to Volunteers	Rewards to Groups
• personal learning and growth	• specialised skills, knowledge & contacts
• gain work experience	• closer contact with the community
• social/recreational enjoyment	• objectivity
• desire to benefit society and make a difference	• credibility
• frustration with the current situation	• new ideas
• gaining approval and recognition	• a reservoir from which paid staff may be recruited
• personal interest in achieving a conservation objective	• an opportunity to mix generations and perspectives
• sense of power and of having an impact	• refreshed energy

Keeping Your Volunteers Volunteering

To be motivated, volunteers need to be able to do the tasks required of them and they need to get some reward for carrying out the tasks; ideally, this will be beyond the satisfaction of getting it done. However, this is an important point, and reinforces the need to start small and build big.

The basic needs of a volunteer are: to know what is expected of them and how they are doing, and to be able to obtain assistance and feedback when needed. Beyond that the following chart shows some ideal rights and responsibilities of volunteers.

Rights and Responsibilities of a Volunteer

Volunteers have the right to:

- be treated as a co-worker
- be given a suitable assignment
- know as much as possible about the group
- be given a variety of experiences
- receive training and continuing education for the task
- have a regular evaluation of performance

Responsibilities of Volunteers are:

- be sincere in the offer of service
- be loyal to the group
- maintain the dignity of the group with the public
- accept guidance and decisions of coordinators
- carry out duties promptly and reliably
- be willing to participate in orientation, training and meetings
- maintain positive working relationships, and understand staff functions
- stay within the bound of the volunteer description

6.2 Working with Partners

Remembers that partners also need to benefit from the project. Here are some guidelines for developing and maintaining partnerships successfully.

Guidelines for Developing Successful Partnerships

1. Have clear project goals
2. Reach consensus on agendas - focus on common interests
3. Be open minded; put away preconceived notions of traditional adversaries and respect each participant's point of view
4. Be willing to learn about others' needs and positions: build trust
5. Be an effective communicator
6. Progress at a pace that accommodates everyone
7. Be realistic about what can be accomplished with limited resources
8. Keep partners involved as the project progresses
9. Give credit where credit is due
10. Be an effective leader; be diplomatic and avoid turf guarding
11. Thank each other
12. Maintain a sense of humour

6.3 Involving the Community

Community participation is a process rather than a single step, one of the first parts of which may be contact between the project initiator (or the individual with the idea) and other like-minded agencies, individuals, or the local municipality. Local participation is critical for success, whether by organizations and their representatives, or by individual local residents. Participation should be as comprehensive as possible, and continue throughout the project.

Involving communities helps anticipate and avoid problems, educates them about the range of benefits and values of the project (both conservation and economic), interests volunteers, and explains the process as well as visitor needs.

Techniques for involving public or interested parties may vary from community to community. Some

which may be helpful are:

- public meetings, town meetings or open houses
- setting up exhibits, information displays in public facilities or shopping malls
- meeting with agency representatives
- meeting with special interest groups

- invited comments
- coffee klatches
- workshops
- advisory committees
- involving commercial tourism operators who are based in or around the area
- bringing in others involved in similar projects or the Saskatchewan Bird Trail
- visiting current wildlife viewing sites in other areas
- phone trees

The views and concerns and ideas of the landowner/manager require considerable attention, particularly when they may be farmers or ranchers. Mutual trust should be developed as early as possible in the project. In addition, project timelines must be clear, both regarding project construction, and its operation, or identifying the times of higher visitation. Points to consider include:

- educating landowners about the community benefits of a project
- making the project easy for them to handle (a lack of inconvenience)
- taking into account the view of neighbouring landowners
- defining timelines

Educating a community for the purpose of stimulating voluntary action means targeting groups from all walks of life. Well designed education programs can lead to tangible results, especially when they get participants out in the field, are delivered in an effective way, and encourage action and reflection. Some local groups have had a lot of success in awarding small contracts to key constituency groups under which they themselves are charged with carrying out education programs.

6.4 Communicating with Visitors: Directions and Orientation

Orientation is a basic visitor need. Without good directions (maps, highway signs, etc.) visitors can go through considerable stress, or give up on the site. Three levels of planning for visitor orientation should be considered:

Pre-visit orientation, providing information on:

- the kinds of facilities and programs, services, activities, etc. at the site
- hours of operation, seasonal use, phone numbers
- a map with directions from main access routes from all directions
- a system of directional signs guiding to the site
- an introduction to the theme of the site

On-site orientation, providing:

- directions to all your resources, facilities, use areas, parking, etc.
- awareness of programs or services available (what, when, where)

Post-visit orientation, ensuring:

- visitors can find their way back to the highway
- awareness of future services or special events, to encourage repeat visits
- awareness of other Bird Trail sites, to encourage them to seek out the Saskatchewan Bird Trail

6.5 Communicating with the Press

Getting the word out about your project is important to its success. Communications should have an integral part of everything the group does. Before you approach the media, work out a strategy. Establish who is the spokesperson. Be clear on your message, then decide who you are trying to reach. Media relations can be the most public and sensitive part of a communication strategy.

To reach reporters, you need to understand their needs. Have you asked them what you can provide to make something interesting enough to be a feature? You should also have identified and introduced your self or your group to all of the reporters who cover the field. Respect reporters' deadlines and need for lead time to prepare an article.

The types of media to consider could be: newspaper articles, newspaper feature stories, editorials letters to the editor, "opinion" pieces for the editorial page, photographs for the newspaper, radio and TV releases, or slide shows. You might find that for the Bird Trail project, a news release will be an important item. Its purpose is to respond to recent developments, announce positions, provide context and background for breaking news, or to announce an event and invite the press to cover it.

For a Successful News Release

- time the release to follow an issue or precede a planned event *immediately*
- use organisation letterhead
- address it to a specific person (editors, specific reporters)
- type it, double-spaced, on one page
- type "News Release" and the date you want it released at the top (or "For Immediate Release")
- type the headline then the story, and include quotes from group leaders
- answer who, what, when, where, whey, how,
- be specific and free of jargon and technical language
- be accurate
- list contact information in the top right corner
- attach a backgrounder with more information if you want

6.6 Celebrate Success With Yourselves and With Others

It is often a good idea to build events around which to maintain the energy and commitment of your group. Rituals can help. Volunteer awards, invitations to ceremonies, and so on, can build a sense of occasion, pride and a sense of achievement.

Events can reaffirm cohesion, and also provide an opportunity to bring new members to your group. Do remember that every step on the path to developing your bird watching site is an achievement: applaud the members of the group; let others know about the success; and take time to celebrate this. Encouragement is not only a valuable tool to maintain commitment, but it expands the likelihood of future community involvement and success. Everyone likes to be involved with a winner.

APPENDICES

SASKATCHEWAN BIRD TRAIL COMMUNITY PLANNING GUIDE

Fund Raising Guide

Chart for Determining Specific Partners, Potential Benefits to them of Participating, & Estimated Costs

Advantages of Integrating into a Provincial Bird Trail

Site Classification System

Fund Raising Guide

STEP 1: BUILD THE FOUNDATIONS

1.1 Get an Idea

- Develop the idea (what is your problem?
- How will your idea address it?
- Are there any other alternative solutions?
- Who will benefit?
- How does the project fit the needs of the community? What is a rough cost estimate?
- What is your organisation trying to do and what does it need to fulfill its goals?

1.2 Gain community Support

- Who are key credible & respected community members?
- Think of local leaders, business people, retirees, elders.
- What support would they have?
- Skills: legal, bookkeeping, computer, etc.
- Business or industry (including spouse)
- Government employees
- Homemakers/elders/students

1.3 Organise

- Leadership
  Roles: (board, directors, volunteers, campaign chair, figurehead chair, subcommittees)
- Formalise
  Incorporate as a society
  Obtain charitable donations number
- Office System
  Set up a system to keep track of information & records (correspondence, donors, mailing lists, archives, proposals, statistics)

STEP 2 DEVELOP YOUR CAMPAIGN STRATEGY

2.1 Make your Case and Set a Campaign Goal

- How will the community benefit? (Identify Key selling features)
- What is the campaign goal? Does a budget back this up?
- What kind of funds are needed?
  - Project (Beginning & end & final project)
  - Core/Operational (office, wages, rent, supplies, equipment)
  - Capital (building, land, machinery) need all the money first

2.2 Identify Research Funding Sources

- Identify Sources (local business licenses at the town office: Chamber of Commerce membership list: Recreation Director for local recreation groups: Family & Community Support Services office for community directory of agencies: Canada Employment Centre - Employer list: Yellow Pages: Consumer & Corporate Affairs for local societies: Library - reference books on foundations & government programs)
- Members: Directors, employees, clients, alumni, volunteers, past supporters
- Community Groups: service clubs, church, business groups, recreation, youth, seniors and others
- Businesses: Local and Non-Local Business and Industry
- Foundations: provincial, national, US, International
- Corporations: locally based subsidiaries, national firms, utility companies
- Institutions: hospitals, care facilities, schools, post-secondary facilities, consortia
- General public: Direct (ask for money)and Indirect (hold special events and activities)
- Governments - Federal, Provincial, Municipal: councils, MDs, counties, other

Who is most likely to support your project? (research each). Try to find out the history of giving (criteria, interests, priorities, restrictions, annual amount, guidelines, who makes the decision, when). Who is in charge (CEO, president, owner), who is on the board of directors, what is their product/service, contact details

In-kind Donations list all items & services your organisation could use & distribute widely & approach local contractors & businesses for services, labour & equipment

- approach businesses for goods & services (print ship - paper, celebrities - items for auction, building suppliers - cement, tools, lumber, schools - photocopying, churches - meeting halls, businesses - computer time, telephones, clerical support, printers - flyers, brochures, posters, professional - accounting, legal, technical assistance, government - mailings, photocopying, supplies, corporations - executive time, publicity, news media - publicity, promotion, building trades - landscaping, hauling, design)

2.3 Assign Tasks and Timelines

- **Membership dues** (ongoing, flat fee or sliding scale, have a discount for seniors & students)
- **Pledges**
- **Fee for Service** (newsletters can be sold to the general public)
- **Matching donations** are effective with *business & institutions* (e.g. for every employee $1, the employer will match (or $2 or .50c) can be used as an example. Challenge groups to compete (classrooms, organisations, etc.) Have a prize or trophy.
- many ***foundations*** operate on a calendar fiscal year & may meet only once a year - the fall can be a good time to approach them. The Canadian Directory of Foundations lists all foundations in Canada & in US (& recipients & amounts)
- contact foundations & corporations to request copy of annual report & info on community support programs
- Contact your **MLA or MP to ask about programs**

Identify Potential Volunteers

- people associated with your initiative - officers, members, those who benefited
- people associated with other organisations, eg service clubs, church groups, schools
- Everyone's families, friends, relatives
- children (almost any activity can have a children's division)
- seniors & elders - often a ready source of human resources
- Fine Option Programs (volunteer work in lieu of fines) local courtworker will know

When approaching volunteers, don't enlist to join a committee, but to do a "task". People like to have a defined & limited job (job descriptions are fine)
Volunteers may have resources (computer & equipment at home/work, access to government rite line, access to wholesale items, have friends or relatives to help)
Train volunteers (confidence, understanding & team spirit)

Develop A Time Line For A Project

Don't underestimate this

Share the Plan informally, first, without asking for money to get feedback. Ask for *INPUT* not money

STEP 3 LAUNCH YOUR CAMPAIGN

3.1 Approach Donors (early - they like to help create a project)

Try to look at the ***Donor's needs*** (could be altruism, acceptance, group support, belief in cause, power & influence, appreciation of an organisation, income or estate tax benefits, recognition, fun/satisfaction)

Approach Them In person

- **make initial contact** (old buddy network helps, & be prepared for questions)
- **prepare for meeting** (who goes? who presents information? prepare for questions, review materials on donor, know any history with donor, prepare handout information) *Have someone comfortable asking for money/contributions*
- **make the request** (ask familiarity w. project, give overview, address questions, request contribution, focusing on reputation, need & good use, ***specific amount*** *& rationale [& know ahead how much is likely]*, other contributors, benefits of donating, how it will be recognised, leave written info & don't press for commitment at that time - set time to meet again) if does not meet expectations, suggest in-kind goods or services to supplement, options for payment, matching contribution scheme
- **approach likeliest donor first** (break the ice with others)
- **follow it up** (summarise main points, questions & concerns, & file, send short letter of thanks & restate what group does, answer questions & add any new information)
- **be enthusiastic; follow up with thank you letter**

Approach via Proposals

- Key = *target* a specific sponsor, donor, program or foundation
- develop a personal relationship in advance (get priorities, tips, format, etc.)
- Know: why it should be done, why not done already, how, how long, how much, who will do the work, what the end product will be.
- Proposal funding occurs because:
  - ⇒ identifiable need
  - ⇒ sound organisational capabilities
  - ⇒ deliverable product
  - ⇒ good management
  - ⇒ reasonable budget

Approach with Presentations

Success depends on: ***Fact, Emotion (enthusiasm), Credibility***

Approach by Canvassing

- ⇒ Door to door
- ⇒ Telephone
- ⇒ Direct mail

3.2 Organise Special Events & Activities

Samples:

Sales

- auctions (cake, silent, art)
- raffles (
- souvenirs/promotions (T-shirts, ties, decals/stickers, mugs)

Events

- dinners (barbecue, box social, picnic)
- shows (arts & crafts, fashion, pets)
- tournaments (cycling, fishing, darts)

Services

- cleaning service (car wash, dog wash, window wash)
- Tours (hiking, sites)
- others (babysitting, lessons, demonstrations)

Select an event which is well matched to your resources, organisation, community

- Draw up a budget
- Choose the date
- Arrange a location
- Plan tasks & timelines
- Set the price
- Keep accurate records (costs, suppliers, equipment, charts, tasks, publicity, timelines)
- Evaluate

3.3 Work with the Media Early On - Publicity

Work on PR early on. If potential donors have heard about it earlier, they are likelier to give when approached)

- **Local newspaper** (advertising, free community announcements, ask for donated ad space & recognise donors, publish twice)
- **Radio** (free PSAs), send at least 2-3 weeks in advance, brief (20 seconds)
- what about being on an open line radio show, talk, or giving away free tickets on air
- **TV** difficult, but possible if project is v. interesting or unique
- **Letters, postcards** (to inform organisations)
- **Posters** (put all over, keep professional, simple, 2 weeks before function)
- **Handbills flyers, brochures** (door-to-door, in mail, under windshield wipers, at retail outlets)
- **Signs, banners** (check with authorities first)
- **Widow display, mall display** (free, approach stores well in advance with a developed idea)
- **Car stickers**

If you got a celebrity or local personality, it would increase prestige, interest and media coverage

STEP 4 MANAGE THE PROCESS

4.1 Keep the Project on Track

- Solicit feedback from community via a public meeting or workshop, but informal feedback is most important
- Ensure you do not loose momentum (in minds of public)
- Share feedback with committee/board

Review Progress/Fundraising Strategy: Successes & Failures (& whys) re:

- Approach with donors
- Special Activities & Events
- Management of Volunteers
- Dealings with the media

Review Volunteer & Media Plans

4.2 Recognise Volunteers and Donors

- in good time, in good taste, enthusiastically

4.3 Keep Community Perception Positive

- Gain community leader support (keep in touch, present them with requests for specific assistance, recognise efforts of leaders with letters, publicity, keep them informed on progress)
- Make progress
- Inform the community (of key milestones, use a sign/thermometer, implement school awareness programs, post signs & posters, hold public meetings & workshops, maintain personal contact, publicity)
- Persevere

STEP 5 CLOSE SUCCESSFULLY

5.1 Tie up the Loose Ends

- At close of initiative, wrap up well - return equipment, close bank accounts, etc.

Collect Pledges

- Go & get them. Send out reminder letters, telephone those you know personally, give a 3 month later reminder

Complete Paperwork

- Have all committee chairs give a written report of activities - responsibilities, schedules, budgets, timing, evaluation & recommendations for improvement
- Which: brought in most money, received most publicity, was best attended, was most successful in raising profile, made best use of volunteers, was easiest, was most difficult?

Prepare financial Statements

5.2 Recognise Donors and Volunteers

- Special thanks are required at wrap up, *as well as* throughout project, to:
  - Volunteers (social), pins/plaques, certificates, medals, mention in newsletters, letters, pictures in local paper
- Keep in touch with donors even when you don't need their money

Chart for Determining Specific Partners, Potential Benefits to them of Participating, and Estimated Costs

Partners	Benefits	Costs
Federal Agencies		
1		
2		
3		
4		
Provincial Agencies		
1		
2		
3		
4		
Foundations		
1		
2		
3		
Corporations		
1		
2		
3		
4		
Businesses		
1		
2		
3		
4		
5		
Conservation Groups		
1		
2		
3		
Recreation Groups		
1		
2		
3		
Education Groups		
1		
2		
3		
Other Groups		
1		
2		

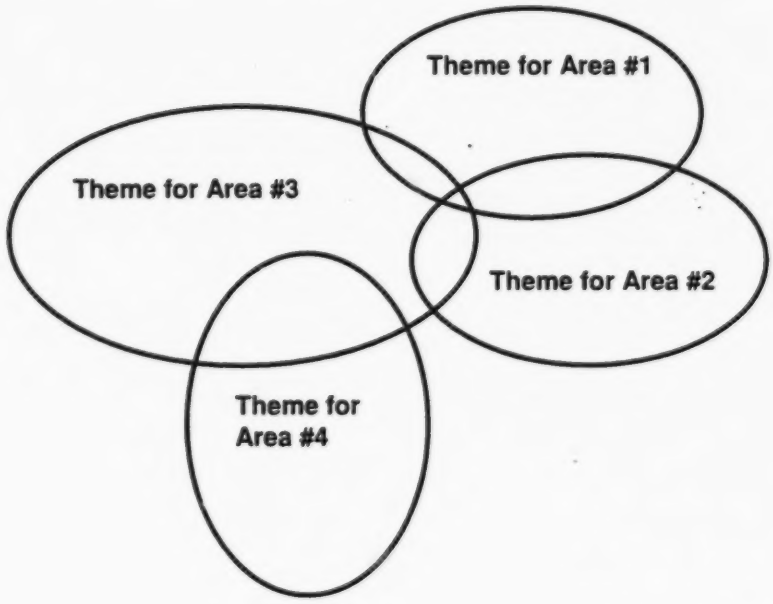
3		

Advantages of Integrating into a Provincial Bird Trail

When planning for the local birdwatching area, it should never be forgotten that the intent is that your area be part of a provincial Bird Trail. A systems approach has several advantages:

- it integrates related facilities, themes and stories
- it provides a variety of levels of experience of "interpretive pacing" for visitors, with a common thread on a regional or province-wide level
- it encourages the use of natural, historical, and cultural resources that might otherwise be ignored or overlooked
- it encourages a more expedient and rational approach to planning interpretive services along travel corridors or scenic routes, which may access areas or interpretive resources of many different agencies and communities
- partner agencies (e.g., provincial parks) may themselves have a systems approach which can be tapped into
- commercial tour operators may give guided tours through the region and benefit from the different experiences at each site
- operators and destinations can "share" markets rather than compete for parts of markets
- the majority of visitors will learn about and encouraged to visit other nearby attractions or regional bird trail destinations

Regional Bird Trail Interpretive Theme Ties Local Themes Together



Site Classification System (Birds or Wildlife)

Category	Management Goals	Description	Examples
Natural	• to provide viewers opportunity to experience nature, view birds & wildlife in solitude, and appreciate natural processes • managed to allow natural processes to continue	• urban, suburban, rural, or wilderness settings • large or small • structures unobtrusive • minimal signage • buildings, if any, concealed as much as possible • viewer use may be restricted to avoid crowding & site damage	• National Parks • Provincial Parks • Regional Parks • Wildlife Sanctuaries • Some river valleys
Semi-Natural	• to provide viewing experiences & information about how people alter wildlife habitats • managed to allow some uses compatible with bird/wildlife values	• many public lands modifies by humans, but with suitable habitat for birds/wildlife • if developed as bird viewing sites, should exemplify good conservation practices • provide good opportunities to demonstrate & interpret good management practices	• Recreation areas • some rivers • reservoirs
Intensively Managed	• to provide viewers with reliable opportunity to see high concentrations of birds or a particular species • managed for production and restoration of species	• include sites featuring "charismatic birds" • may include buildings, parking lots, etc. to enable heavy viewer use	• waterfowl production areas
Restoration	• to provide opportunities for people to get involved in conservation projects • to restore degraded habitats and monitor	• establishing rehab sites may help managers develop effective methods & techniques, and demonstrate conservation benefits	• riparian restoration • wetlands reclamation
Education/ Interpretive	• to help visitors gain greater understanding of birdlife, habitat & ecological processes	• any site may have interpretative programs, information or materials, but some sites may be established primarily for education (e.g., an urban nature centre)	• nature centres • botanical gardens